

CAPPS
HR/Payroll User Group
Tuesday, January 22, 2019
9:00 a.m. – 11 a.m.
Travis Building, Room 1-111

Meeting Minutes

I. Welcome (Andrea Smith)

- Roll call for phone participants.
- All User Group meeting materials will be posted on FMX in the next few days.
 - To be added to the User Group distribution list, please send an email to the CAPPS Governance and Communications Team at CAPPS.GTT@cpa.texas.gov.
- Please welcome Robbi Craig from the Railroad Commission. She has been selected as the new medium-sized agency representative/Voting Member.

II. Production Update: HR/Payroll Support Requests (SRs) (Andrea Smith)

- **SR Summary and Trend Report**
 - The **CAPPS HR/Payroll Summary and Trend Report 01/22/19** document was reviewed.
 - There were 744 active SRs and 154 were considered high. There were no critical SRs.
 - For the month of December, there were 520 SRs opened and 533 closed.
- **Governance Approved Enhancements**
 - The **CAPPS HR/Payroll Governance Approved SRs 01/22/19** document was reviewed. Updates since the last meeting are identified with an asterisk (*) and **bolded**.
 - SR 435 has been moved to a closed status. This is the SR that was initially approved to change the system to use State Job Codes but was later determined that this change would not work with unclassified agencies. It was resubmitted to Governance with a recommendation to reject so it could be closed and removed from the list. That process has been completed and the SR will be removed from the list after this month.
 - SR 7561 is the change to add the Document ID field to certain agency admin pages. This change has been completed and the functionality was moved to Production as of 12/20/18.
 - SR 8847 is a Recruit request to add the Position Number to the Requisition Details Report. This was approved by Steering Committee on December 4, 2018. This was a very small configuration change and it has now been completed. It was migrated to Production on January 3, 2019 and is currently in *Pending Prod Approval* status.
- **Required Maintenance**
 - The **CAPPS HR/Payroll Required Maintenance 01/22/19** document was reviewed. Updates since the last meeting are identified with an asterisk (*) and **bolded**.
 - SR 3767 and SR 8857 have both been completed and will drop off this list after this month.
 - Two ACA-related items, SR 10884 and SR 10896, are Pending Prod Migration.

III. Production Update: FMLA Updates (Chelsa Vinklarek)

- The **CAPPS FMLA Updates 01/22/19** presentation was provided to participants.
- The CAPPS Production Support Team is working on a major overhaul of how FMLA is managed in the CAPPS system, making FMLA tracking easier for both administrators and employees.

- A few short-term changes have already been made, to reports and certain pages.
- The focus is now on the long-term changes.
- Most of these changes are now in System Test with a few final design items to be completed.
- The plan is to implement these changes sometime in this spring.
 - The CAPPS team is working to have UAT dates and additional Go-Live information finalized by the next User Group meeting in February.
- Key improvements to FMLA management will include:
 - FMLA Balance page will be available to both employees and administrators.
 - Limits added to timesheets that will prevent someone from exceeding their approved amounts.
 - Easier tracking of multiple events and intermittent leave limits.
 - Fluid navigation for timekeeping will give summary as of current date – “checkbook” design will allow users to click into the details with having to navigate different pages.
 - Hours used and balance remaining. Any balances kept in CAPPS Central will be displayed regardless of the employee’s agency at that time.
 - Agencies on a rolling back year will see the dates from the previous year to help calculate when it’s coming back.
 - The checkbook format will provide a running balance, showing one year back from the oldest active event and it will total up until the maximum number of hours is reached.
 - A new batch job is being created to calculate balances and track timesheet entries; it will also calculate for the rollback by FMLA Request ID.
 - FMLA Entitlement Hours page will have new or redefined fields. This is the page that the timesheet will read from to determine if hours have been exceeded, thus preventing the timesheet entry from being saved.
 - A page for Non-CAPPS FMLA Hours entry will be added so information can be manually entered for employees who are transferring from an agency that is not on CAPPS Central, such as a Hub Agency or one that has not yet deployed on CAPPS.
 - Legal impacts to the FMLA system include the 480 Hour limit (12 weeks) and the process for employees transferring between two different FMLA plan types.
 - Most agencies are using the rollback year format but a few are using other plans.
 - Employees who transfer to an agency using a different plan type have 60 days to use whichever type they prefer to use before transitioning to the new agency’s format.
 - The CAPPS Team has made some general inquiries into the possibility of converting all CAPPS Agencies to the same FMLA plan, using the rollback year format across the board.

IV. Production Update: OCI Environment (Chelsa Vinklarek, Ivan Mazoch)

- The **CAPPS OCI Environment Overview 01/18/19** presentation was provided to participants.
- There are two major projects that will have Production impacts over the next few months: Migration to the Oracle Cloud Datacenter (OCI Project) and the FY19 CAPPS HR/Payroll and Financials Deployments.
 - The OCI implementation is being done first so that it is completed and will not impact the deployments.
 - THE CAPPS IT Technical Team presented the OCI implementation plan and a list of key activities to the technical teams at the agencies in December 2018 and want to provide a high-level update now to the User Groups to help prepare everyone for the change.

- Planning for this environment change began July 2018. OCI was selected because it will provide better performance and cost-savings.
- The CAPPS technical team has been working to build out the new servers in preparation for an April 1, 2019 deployment. Internal system testing started in December and preparation are underway to begin user testing in March.
- Key Dates:
 - 01/18/2019: Agency Technical Teams received an email with the new URLs, IPs, and Ports that are required on the agency side, along with new firewall rules.
 - 01/18 – 01/28: Agency implementation of new firewall rules and completion of Network Connectivity testing.
 - 03/11 – 03/29: Agencies perform User Acceptance Testing in OCI Production environment.
 - 03/29 – 04/01: Go-Live weekend for Production, Maintenance, and Reporting environments. NOTE: All current systems will be down during this weekend while the transition is completed.
 - 04/01/19: All CAPPS Production Agencies are live in new OCI environment.
- Agencies' technical staff have instructions to test the items listed in the 01/18/19 email to make sure they can see the Sign-on page now.
 - It is critical that the tech teams test these items from all business locations, including any field offices or other remote work sites as well as testing access through the VPN. This needs to be done to ensure that the agencies are ready when UAT begins.
 - All environments on the provided list need to be tested to make sure the agency can access them.
 - The presentation provided at this meeting is a summary of the information already shared with the agency tech teams. Please feel free to share this with them and to follow-up with any questions you may have for your internal team.
- Key Impacts to Agencies:
 - All environment URLs are changing.
 - All bookmarks will need to be reset.
 - All favorites will be purged because the URLs that they are based on will have been removed/changed to the new OCI URLs.
 - The current UAT environment will be moved effective 03/11 (start date of Agency UAT testing).
 - Employees will still be using the old Production URL during the Agency UAT testing period.
 - UAT Testers will need to clear their cache when switching between the environments.
 - Queries should not be impacted by this change.
 - NOTE: The old URL will not redirect automatically to the new one. There will be a message with the new URL provided but it will not happen automatically, and eventually the old URL will be completely shut down.
 - Sample test scenarios will be provided and agencies need to make sure they have worked through all these to ensure that all pages and access points are working correctly.
- The CAPPS Team will be sending out emails with dates and action items throughout this project.
- Ivan Mazoch is the primary point of contact for this project.

- Questions or concerns can be submitted via an Information SR in the ASP Solution Center, or email CAPPS.IT@cpa.texas.gov.
- For SRs, please make sure that the first word of the Short Description is “OCI” – this will ensure it gets routed correctly and quickly to Ivan’s team.

V. Project Update: HR/Payroll FY19 Deployment (Rusty Charlton)

- The **CAPPS FY19 HR/Payroll Agency Deployment Project Dashboard 01/22/19** document was reviewed.
- The project is green and on track to deploy fourteen (14) new agencies on CAPPS HR/Payroll on July 14, 2019.
 - Current Production agencies will see new code changes on July 8.
- There will be a total of five (5) mock conversions prior to Go-Live; the second mock conversion is in progress this week.
- The Deployment team is starting work with the new agencies on Security Analysis and Reporting Analysis to evaluation if their needs can be met by existing functionality or if they will need something new.
- Build progress is going well.
- Agency Partnership Programs (APPs) are in progress.
- On the training side, the team is starting to work with agencies on their Train-the-Trainer programs.

VI. Project Update: Recruit FY18 Deployment (Martin Dassi)

- The **CAPPS FY19 Recruit Agency Deployment Project Dashboard 01/22/19** document was reviewed.
- The deployment will occur in two releases – the first on March 25 and the second on May 15.
- Both releases are green and on track – overall, all is going very well.
- Milestones:
 - Conference Room Pilots (CRPs) and Configurations have been completed.
 - Release 1 Design and Build have been completed.
 - Release 2 Design is in progress.
 - Release 1 UAT Kickoff meeting is scheduled for January 31.

VII. Discussion Topic: Reminder on W2 Processing (Andrea Smith)

- Processing has been completed for most agencies; the Support Team is still waiting to hear from seven (7) agencies.
- Agencies need to review and authorize before CPA can move to print.
- If an agency is stuck in the data analysis, please get in touch with the HR Production Support Team as soon as possible to get assistance.
- The team is adding notes to the agency SRs as they become available for pickup and most agencies’ printouts are available as of today.

VIII. Discussion Topic: AWE Management Workflow (Daryn Burleigh)

- The **CAPPS AWE Sample Workflows 01/22/19** handout was provided to participants.
- The change is being implemented to provide the most flexibility without the need to maintain numerous workflows in the system.
 - AWE Workflows will become MSS delivered configuration for approval processes.
 - It will primarily impact MSS Agencies for one time merits and regular merits.

- The process will help to eliminate excess paperwork and make the overall process more efficient, including better tracking ability.
- Agencies can choose from the three Workflow options shown in the handout.
 - The Simple Workflow will be the default workflow in the system.
 - The Medium Workflow has a few additional approval steps.
 - The Complex Workflow is very similar to the Medium but the final approver is not the Department Head.
- In the handout, roles with an asterisk next to it can be defined in the system by the agency; it can be any role/level the agency chooses.
 - For example, an agency could identify a role at a particular manager level, in HR or a Budget group.
- Once the Workflow is selected, the levels of approval are not optional – all roles must be completed. However, there is some flexibility to repeat an approver at a later interval.
 - For example, in a Medium workflow setup, the first Approver Role might be the Department Head, then go on to budget or HR, the move to the Department Head to complete the process.
- The selection will apply to the whole agency, not configurable by department/division.
 - The CAPPS Team will work with agencies to help identify and setup the right workflow choice and workflow approvers.
 - If an approver role is vacant, it can be managed by a workflow admin or other option. It depends on how the agency is set up.
- Go-Live for the code implementation is July 8, 2019 but agencies are not required to adopt the code immediately. An agency can choose to delay and roll out at a later date that works better for their setup.
- Agencies interested in learning more about the functionality, and about how these options might work for their structure, should submit an SR to setup an initial review meeting. This would be informational only and not a commitment to implement with the code Go-Live.
 - Please reach out to the CAPPS HR Production Support team with any questions or concerns on these options or the rollout of the code.
- The CAPPS team expects to be able to run reports from this process in the future but has not yet starting any evaluation or design process at this time.

IX. Meeting Close

- The next User Group meeting is on Tuesday, February 26, 2019 in the Travis Building, Room 1-100.